

CARLI Resource Sharing Committee

2021-2022 Annual Report of Activities

Members

- Elena Carrillo, University of Illinois at Chicago (2021-2024)
- Marissa Ellermann, Southern Illinois University Carbondale (2021-2024)
- Sarah Henderson, Monmouth College (2021-2024)
- Sarah Hoeksema, Trinity Christian College (2021-2023)
- Shelly McDavid, Southern Illinois University Edwardsville, co-chair (2019-2022)
- Janelle Sander, University of Illinois at Urbana-Champaign, co-chair (2019-2022)
- Caitlin Stewart, Illinois State University (2021)
- Ashtin Trimble, Black Hawk College (2018-2023)
- Erin Zimmerman, Heartland Community College (2019-2022)

Discovery Primo VE TF Liaison: Nathan Theborge, Trinity International University
E-Resources Management TF Liaison: Sara Rizzo, National Louis University

CARLI Staff Liaisons: Debbie Campbell and Bradley Woodruff

CARLI Board Liaisons: Dr. Sharon Silverman, Olive-Harvey College

Meetings

All of our meetings took place via Zoom on the first Tuesday of every month (9:00-10:30AM). Since the committee primarily meets online, our regular operations were not impacted by the varied work environments we were all in during the FY22 year (remote work, partially open institutions, transitions, and/or reopened institutions).

Completed Terms

The committee sends sincere thanks and appreciation to our dedicated committee members whose terms are ending this year.

- Shelly McDavid, Southern Illinois University Edwardsville, co-chair (2019-2022)
- Janelle Sander, University of Illinois at Urbana-Champaign, co-chair (2019-2022)
- Caitlin Stewart, Illinois State University (2021)
- Erin Zimmerman, Heartland Community College (2019-2022)

During the upcoming June 2022 meeting, the committee will select the committee co-chairs for the FY23 year.

Committee Charge

The CARLI Resource Sharing Committee works with the CARLI staff and members to identify, develop, and encourage cooperation and collaboration in sharing the full depth and breadth of the consortium's collective resources. The committee will identify efficient and cost-effective best practices. The Resource Sharing Committee will collaborate with other CARLI committees and ad hoc groups to discuss issues of common interest and to facilitate joint program planning.

The committee may be assigned projects by the Board of Directors, or may independently develop projects and initiatives within the scope of its charge or in collaboration with other ad hoc groups. The Resource Sharing Committee acknowledges historical, structural, and systemic injustice, values the principles of diversity, equity, and inclusion (DEI), and will ensure that CARLI's commitment to DEI is embedded in their work. The committee will identify educational and training needs within its scope of responsibility and its collaboration with other committees, and will develop workshops, seminars, webinars, or other education opportunities to meet the needs of the membership. The committee will prepare appropriate documentation and reports, and will submit an annual report of its activities and accomplishments to the Board of Directors.

Theme

Growing familiarity with the Alma ILS alongside the Primo VE Discovery layer.

Annual Project

With the migration from Voyager to Alma, the Resource Sharing Committee focused their work in FY22 on multiple smaller projects instead of one larger research project. These projects are outlined below.

Monthly Alma and Primo VE Release Notes Review

Committee members took turns reviewing monthly Alma and Primo VE release notes, highlighting any upcoming changes that would impact resource sharing processes and workflows. Any relevant changes were documented, shared with the committee, and published to the CARLI website: <https://www.carli.illinois.edu/products-services/i-share/alma-fulfillment/ResSharReleaseNoteReview>

Discussion Series: CARLI Resource Sharing in our New Age: Tips and Tricks in the Time of Alma and COVID

To connect with our CARLI library colleagues during the FY22 year, the committee decided to host once-a-month virtual group discussions on varied topics, facilitated by committee members to get the conversation going. Following a brief presentation or introduction, attendees at these semi-informal sessions could participate in Q&A and topical discussion.

Discussion Series: October 29 Two Libraries' Different Approaches to Lost and Billed Materials Processes

The CARLI Resource Sharing Committee's October Discussion focused on using Alma Analytics reports and dashboards to process lost materials for billing and automatic transfer of fees to a campus system. The session started by hearing from two academic libraries and their different approaches to processing lost materials for billing. Janelle Sander of University of Illinois at Urbana-Champaign discussed automatic transfer of fines to an external bursar system and how that process impacts billing workflows. Shelly McDavid, from Southern Illinois University Edwardsville, demonstrated how leveraging customized dashboards and reports in Alma Analytics has enabled her library to start slowly working through current and future workflows for lost and billing processes. This session with 71 registrants was recorded and posted to the CARLI website: <https://www.carli.illinois.edu/ResourceSharingCommittee20211029>

Discussion Series: December 3 Course Reserve Management in Alma and in Leganto

The CARLI Resource Sharing Committee's December Discussion focused on course reserve management using Alma and Leganto. The session began with two academic libraries sharing their different approaches to reserves. Sarah Henderson, of Monmouth College, discussed using Alma course reserves in a small school setting. Belinda Cheek, of North Central College, talked about their implementation of Leganto and how it integrates with Alma course reserves. This session with 51 registrants was recorded. The recording was lost.

Discussion Series: February 18 Two Libraries using Alma Analytics for IPEDS and ACRL Reporting Data

The CARLI Resource Sharing Committee's February Discussion focused on using Alma Analytics reports and dashboards to crosswalk data from Alma Analytics reports and dashboards to the needed data for ACRL and IPEDS reporting agencies. Lisa Wallis from Northeastern Illinois University

demonstrated a data crosswalk of ACRL data to Alma Analytics reports and dashboards, and Shelly McDavid, from Southern Illinois University Edwardsville, demonstrated a crosswalk of IPEDS data to Alma Analytics reports and dashboards. Each presenter underscored the importance of involving the correct people at your library to ensure a clear baseline of understanding of backend set-ups, as well as the reality that not all reported data is found in Alma and will need to be gathered by others within your library. Importance was stressed on reviewing and understanding the ACRL and IPEDS reporting agencies data point definitions to ensure your data is accurate and has integrity. This session with 88 registrants was recorded and posted to the CARLI website:

<https://www.carli.illinois.edu/ResourceSharingCommittee-20220218>

Discussion Series: April 22 Alma Patron Proxies

The CARLI Resource Sharing Committee's April Discussion focused on Proxies and the ways three different libraries set them up and use them. Depending on local policies and patron needs, some libraries allow their users to designate another user to perform some circulation functions on their behalf. There are several ways to set up proxies in Alma, three of which were discussed in this webinar. Marissa Ellermann, from Southern Illinois University – Carbondale, demonstrated setting up local circulation proxies and some best practices and procedures to follow, including examples used at SIUC. Cheryl Grubb, from Wheaton College, discussed setting up proxies upon request from professors who want to enable teaching assistants to place AFN requests on their behalf. Janelle Sander, from University of Illinois – Urbana-Champaign, discussed the Fulfillment Proxy functionality that Ex Libris released to our Alma environments in December 2021. This session with 38 registrants was recorded and posted to the CARLI website: <https://www.carli.illinois.edu/ResourceSharingCommittee-20220422>

Alma and Primo VE testing and troubleshooting

During the FY22 year, the committee led and assisted CARLI office staff in testing and troubleshooting many aspects of Alma and Primo VE. A list of these tasks and topics includes:

- Alma and Primo VE configuration:
 - Automatic Renewals for I-Share patrons
 - CARLI Office staff held a webinar for enabling local renewals for local patrons on October 21: <https://www.carli.illinois.edu/alma-automatic-renewals-local-patrons>

- Survey was sent to I-Share member libraries in November; results favor waiting until Alma can send the patron a letter that their item was auto-renewed (functionality expected in 2022).
- “Item Availability” indicator on the Primo VE AFN/I-Share request form
 - Multiple committee members tested this functionality to assist CARLI Office staff in gauging its effectiveness/accuracy.
- I-Share Requesting over winter break
 - The committee discussed, and then the CARLI Board approved a winter break recommendation to turn off the ability to place new I-Share requests through Primo VE between 5pm on Thursday, December 23, 2021, and 8am on Sunday, January 2, 2022.
 - Whether to pause, or not, resource sharing will be re-evaluated for winter break 2023.
- Alma January Release Feature: Testing “Fulfillment Library Independence”
 - Members of the committee met with CARLI Office staff to test this setting in the UIC Sandbox in May 2022.
 - Initial testing shows this setting is not AFN-aware enough to encourage use by any I-Share library.
 - Further testing of additional Fulfillment Library Independence functionality will be conducted by committee members and CARLI Office staff in June 2022.
- Alma March Release Feature: Extend due date past patron expiry date
 - Following discussion, the committee is in favor of NOT enabling this setting for any I-Share library.
https://knowledge.exlibrisgroup.com/Alma/Release_Notes/2022/Alma_2022_Release_Notes?mon=202203BASE
- Alma Fulfillment configuration> Other Settings, “check_patron_duplicate_borrowing_requests”
 - Following discussion, the committee is in favor of having the CARLI Office staff adjust this setting to “false” to allow patrons to request multiple copies of the same title.
 - CARLI Office staff will send an announcement, and make this change in June 2022.
- Alma Configuration> Fulfillment job> Borrowing Activity Report Job
 - The committee will finalize their discussion of these related settings and letters in June 2022.
- Alma letters, letter formatting, and consortial intervals:
 - Ful Hold Shelf Request Slip Letter

- Adding “Hold Until Date” once ExL fixes bug related to SF case 06295346
 - Ful Lost Refund Fee Loan Letter
 - Turning on for all I-Share notices, with an option for libraries to turn off local notices
 - Return Receipt Letter (discussion will be finished at June 2022 meeting)
 - Mandatory on for I-Share vs Local notices
 - Providing institutions the ability to opt out of local notices
- Documentation
 - Reviewed the Best Practice Recommendations for Named Users in I-Share
 - Reviewed the Best Practice Recommendations for Creating Generic User Accounts in Alma for I-Share